

Executive Dashboard - Financial - WealthTrends (Customers)

Provides key measures to evaluate the economic and financial wellbeing of the neighbourhoods where customers live. This customer weighted report also contains data visualization that are provided to better illustrate key economic and financial trends for Savings, Investments, Real Estate values and Consumer Debt.

WealthTrends | Quarterly Growth Rates



Customers: Sample_Customer_File: Record Count

The customer file used for report.

AVERAGE VALUES AND GROWTH RATES PER HOUSEHOLD

	2020 Q4	2021 Q1	% Growth: Q4 to Q1
WealthScapes Totals			
WealthTrends Net Worth - Value	\$522,755	\$609,072	16.5
WealthTrends Assets - Value	\$705,747	\$793,664	12.5
WealthTrends Debt - Balance	\$182,992	\$184,592	0.9
Assets - Savings			
Total Savings - Balance	\$90,125	\$90,000	-0.1
Chequing & Savings Accounts - Balance	\$54,969	\$55,833	1.6
GICs and Term Deposits - Balance	\$35,157	\$34,167	-2.8
Assets - Investments			
Total Investments - Balance	\$139,998	\$143,989	2.9
Stocks - Balance	\$33,619	\$33,888	0.8
Bonds - Balance	\$6,788	\$6,505	-4.2
Investment Funds - Balance	\$99,591	\$103,597	4.0
Assets - Unlisted Shares			
Unlisted Shares - Balance		\$17,975	6.7
Assets - Real Estate			
Total Real Estate - Value		\$541,699	18.1
Primary Real Estate - Value		\$440,010	18.0
Other Real Estate - Value	\$85,914	\$101,689	18.4
Net Real Estate Equity - Value	\$333,713	\$413,930	24.0
Debt			
Mortgage - Balance	\$125,059	\$127,769	2.2
Total Consumer Debt - Balance	\$57,933	\$56,822	-1.9

The average balance for total investments for the neighbourhoods where these customers tend to live is **\$139,998** for the last quarter of 2020 (2020 Q4). In these same neighbourhoods we see a **2.9%** increase from 2020 Q4 to 2021 Q1 bringing the average balance for investments funds to **\$143,989**.

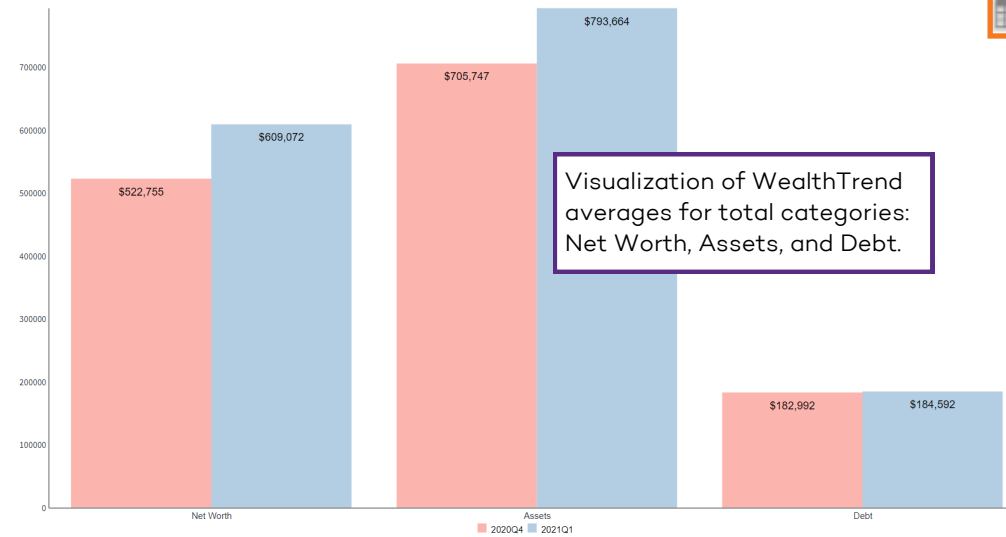
Quarter (e.g. 2020 Q4): The value or balance in dollars per household in the customer neighbourhoods for the variable during a quarterly period.
% Growth (e.g. % Growth Q4 to Q1): Provides a measure for comparing values between quarters, while also describing economic and financial growth patterns for households in the customer file.

% Growth Legend: < 0% > 0%


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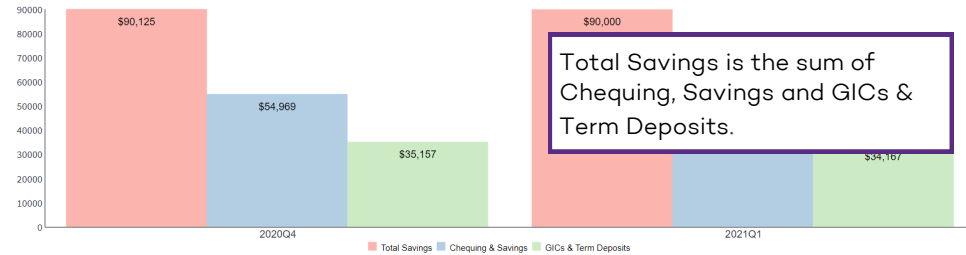
WEALTHTRENDS AVERAGES PER HOUSEHOLD



Visualization of WealthTrend averages for total categories: Net Worth, Assets, and Debt.

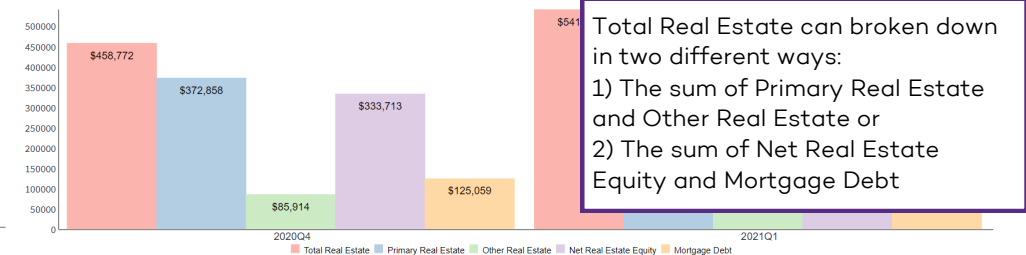
Note: Change to tabular format by scrolling over the graph and clicking the spreadsheet icon in the top right corner. Once in tabular format, download the data by scrolling over the table and clicking the Excel icon, , that appears in the top right corner of the table. Return to the graph by clicking on the spreadsheet icon.

SAVINGS PER HOUSEHOLD



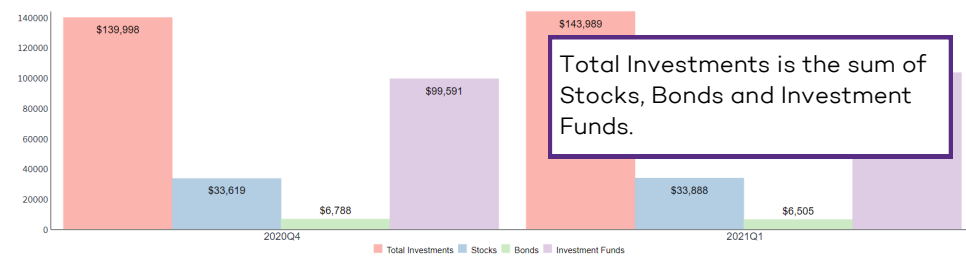
Total Savings is the sum of Chequing, Savings and GICs & Term Deposits.

REAL ESTATE VALUES PER HOUSEHOLD



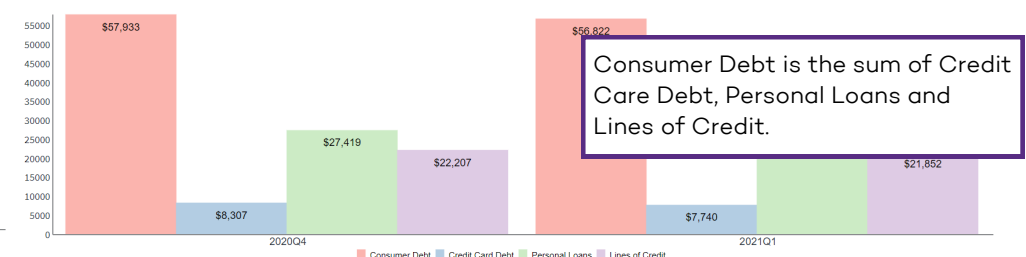
Total Real Estate can be broken down in two different ways:
 1) The sum of Primary Real Estate and Other Real Estate or
 2) The sum of Net Real Estate Equity and Mortgage Debt

INVESTMENTS PER HOUSEHOLD



Total Investments is the sum of Stocks, Bonds and Investment Funds.

CONSUMER DEBT PER HOUSEHOLD



Consumer Debt is the sum of Credit Card Debt, Personal Loans and Lines of Credit.